



Heritage Preservation Education & Training Initiative

(Applications due March 3, 2008)

Montana State Historic Preservation Office

Grants to Preserve and Promote
Montana's Heritage and Cultural Assets

2ND REQUEST FOR PROPOSALS: GUIDELINES AND APPLICATION INSTRUCTIONS

(Important updates in blue.)

OVERVIEW

In October 2007, the Montana Historical Society State Historic Preservation Office (SHPO) called for Preserve America II applications. The first round allocated \$37,638 of the \$65,000 available, and the remaining **\$27,362 is being offered in a second request for applications**. These funds will be subgranted to designated Montana *Preserve America* Communities, communities applying for Preserve America designation, and/or Tribal Historic Preservation Offices. **The maximum allocation for both PA II funding rounds is \$15,000 per community**. An additional \$2,500 is available for small scholarships to attend preservation training venues. These guidelines and application Instructions will explain the process for securing a subgrant and/or scholarship. *Montana Heritage Preservation Education & Training Preserve America* Grants support communities that have demonstrated a commitment to recognizing, designating, and protecting local cultural resources. Grants are to assist local economies find self-sustaining ways to promote their cultural resources through heritage tourism and education.

For Preserve America Community designation information, see www.preserveamerica.gov.

Montana Heritage Preservation Education & Training Initiative Preserve America Grants will be awarded through a competitive process and each grant will require a dollar-for-dollar, non-federal match, that can be in the form of cash or in-kind donated services for grant-assisted work. The grant and the non-federal match must be expended during the grant period (12 – 15 months) and funds are reimbursed after the work is complete. Projects may be completed, evaluated, and reimbursed before the PA II deadline. The minimum grant request is \$3,000 federal share (resulting in a total project cost of \$6,000). The maximum grant request for any project is \$15,000 (resulting in a total project cost of \$30,000). Scholarships are limited to \$500 per person with match required. Approved scholarships will be reimbursed after training and travel have occurred.

Eligible activities, selection criteria, administrative and funding requirements, and application submission instructions follow. Applicants should review the selection criteria and evaluation criteria carefully, along with the guidelines and application instructions in detail before completing the application. Examples of eligible grant projects can be found at the end of these guidelines. More than one project may be included in a community's application but all the projects must be training-related and be completed on or before the PA II deadline.

WHO MAY APPLY

- Designated *Preserve America* Communities and Neighborhoods in Montana.
 - Montana communities showing proof of application for *Preserve America* Community designation.
 - Tribal Historic Preservation Offices in Montana.
 - **For scholarships only:** Local historic preservation commissioners, local historic preservation officers, PA organizers in PA Communities and communities that have submitted an application, Tribal Historic Preservation Officers and staff, and affiliated volunteers.
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WHAT IS FUNDED

Montana Heritage Preservation Education & Training Preserve America subgrants support planning, development, implementation, or enhancement of innovative activities and programs in heritage tourism, focusing on preservation education and training. Successful applicants will emphasize creative projects that will promote and preserve the community's cultural resources. Successful projects will involve public-private partnerships and serve as models to rural communities nationwide for heritage tourism, education, and economic development. [The project must fit the training category](#) listed below. Please see the example projects at the end of this document.

Preservation Education and Training

Training projects must provide opportunities for professional development in areas that aid a community in utilizing and promoting their historic resources. Training opportunities must improve the function of a business, museum, or site, or enhancing public appreciation for a historic district. Projects may include hospitality training for local hotels and B&B's, small business development training for a locally owned main street business, and preservation training for the local planning office to help them protect their heritage resources.

WHAT IS NOT FUNDED

Montana Heritage Preservation Training Initiative Preserve America subgrant program does not fund:

- Projects without a preservation education or training focus.
- Repair, Rehabilitation, and Acquisitions of historic properties, sites, or collections.
- Conservation of collections.
- Long-term maintenance or curatorial work.
- Reconstructing former historic properties.
- Moving historic properties.
- Construction of new buildings.
- Cash reserves, endowments, or revolving funds.
- Fundraising costs.
- Work performed prior to announcement of award.
- Miscellaneous costs, contingencies, reserves, and overhead.

ADMINISTRATIVE AND FUNDING REQUIREMENTS

A dollar-for-dollar non-Federal match is encouraged for all projects. Federal funds, except Community Development Block Grants (CDBG) grants, may not be used for match although informal partnerships with federally funded programs are encouraged. The non-Federal match can be cash, donated services, or use of equipment. It can be raised either before or during the grant period. Matching share does not have to be "in the bank" but include your plan to raise the match. If rural communities find it difficult to obtain a full 50/50 match, please call the State Historic Preservation Office for advice.

- The grant period is generally 12 – 15 months and will be specified in the grant agreement.
- Grantees may not seek reimbursement for time and/or materials not directly related to performing project work.
- Competitive selection of all consultants and contracting is required.
- Applications must be signed by authorized government office.

SUBGRANTS TIMELINES (1.5 YEAR GRANT CYCLE)

January 25 – March 3, 2008	SHPO announces availability of funds SHPO conducts Request for Proposal (RFP) process SHPO conducts site visits to assist with applications, if requested
March 3, 2008	Applications submitted on or before Monday, March 3, 2008
March 3 – March 15, 2008	SHPO reviews proposals
April 1, 2008	SHPO announces subgrant awards
April 1 – 15, 2008	SHPO contracts with subgrantees
April 14, 2008	Subgrantee starts project(s)
April 14, 2008 – March 2009	SHPO provides technical assistance

January 30, 2008 – March 2009

June 30, 2009

July 31, 2009

SHPO evaluates subgrant progress, both adjusts as necessary
Subgrantee submit mid-term report and request for reimbursement
Subgrantee completed project(s) on or before June 30, 2009
Subgrantee submits final report and request for reimbursement
on or before June 30, 2009

GRANT AMOUNTS

Project applicants may not request less than \$3,000 or more than \$15,000 federal share. Scholarship applications may request up to \$500 per person. Both require 50/50 in-kind or cash match. Please note that the grant reviewers and/or the State Historic Preservation Office may, at their discretion, award more or less than the funding request. [The maximum allocation for both PA II funding rounds is \\$15,000 per community.](#)

APPLICATION DEADLINE: MARCH 3, 2008

WORK PROJECT EVALUATION AND SELECTION CRITERIA

The work project applications must address each of the following criteria. For scholarships, please see next section.

1. **How will the proposed project use and promote the community's historic resources?** (20 points)
2. **How does the proposed project contribute to the long-range goals of the community and preservation of its historic resources?** (i.e. how does the project meet the goals of the local or statewide preservation plan, heritage tourism plan, or plan for an existing heritage area.) Identify the source of the community's long-range goals and when they were developed and adopted by the community. (20 points)
3. **Why is the proposed project the most appropriate action or strategy for the promotion of heritage tourism and economic development at this time?** (10 points)
4. **Does the project involve a public-private partnership that will continue to support the resource(s) after the grant project is complete?** Describe all entities that are involved with, or affected by, the project. Attach documentation of involvement from partner organizations directly involved in the project. Describe the extent to which the public will be involved with the project. (15 points)
5. **Is the project feasible, are the costs eligible, and the source of the required non-federal match identified or a plan is in place to raise it?** (i.e. able to be completed within the proposed activities, schedule, and budget) (25 points)
6. **Has the applicant completed previous projects in a timely manner?** (10 points)

SCHOLARSHIP EVALUATION AND SELECTION CRITERIA

Scholarship reimbursement applications must address each of the following criteria.

1. **Name and description of the conference or workshop, location, and dates. How will the education/training benefit the community?** (40 points)
 2. **How and when will the learned information be delivered to the community?** (20 points)
 3. **How does the education/training fit with the community's heritage tourism and promotion strategy?** (20 points)
 4. **What cash and/or in-kind sources will match the scholarship?** (20 points)
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SUPPLEMENTAL INFORMATION

Reviewers' evaluations are based on the material provided in the application. Supplemental information can be included but will not take the place of a concise and well-written application. Supplemental information might include items such as:

- A portion of a community's historic preservation or community development plan that identifies the need for this grant project.
- Market study that identifies the next step for heritage tourism enhancement in the community.
- Evidence of project involvement that demonstrates a commitment of resources to the project, either through cash funding, in-kind support, or continued involvement after the project is complete.
- Photographs of the historic site, museum property, downtown, or significant resource involved in the project.
- Public-private partnership agreement to promote heritage tourism.

EXAMPLES OF POSSIBLE GRANT PROJECTS

The following exemplify the kinds of activities that qualify for *Montana Heritage Preservation Education & Training Preserve America* grant funding under each criteria:

Coordination and hosting of a public preservation [workshop](#), such as how to repair historic wood windows.

Hosting a nationally known preservation [speaker](#) on such topics as preservation economics, design review, ordinance/resolution writing, disaster planning for historic resources, etc.

Preservation "how-to" publications.

Coordination and hosting of a Tribal preservation [conference](#).

Hosting an MPA Preservation Team [Workshop](#) for a local "white elephant" building.

Support attendance at an in-state or out-of-state preservation conference or [workshop](#). (Request may be part of the larger grant or in a separate scholarship.)

Statewide or regional program to provide hospitality [training](#) to designated *Preserve America* communities.

Business development [training](#) course to help Main Street communities, museums, and local nonprofits learn how to better market and expand their sales by using the internet.

Develop and establish a [training](#) program to recruit senior citizens to serve as volunteer docents and tour guides for historic sites and downtown tours.

Community [training](#) in local history and heritage resources for educators or employees in tourism-related businesses.

Promote cultural diversity and heritage tourism via a [lecture/fieldtrip](#) series.

Increase awareness between the development community and public sector partners by promoting the Federal Historic Preservation Rehabilitation Tax Credits via a real estate [training workshop](#).

Promote heritage education and tourism by developing preservation curricula for youth and adults.

Combine education/[training](#) efforts and events with other eligible communities.

APPLICATION SUBMISSION

Applications must be submitted in hard copy or email attachments. No faxes will be accepted. Applications not received by the deadline or incomplete applications will not be considered. Additional materials sent separately from the application must arrive by the deadline as well to be included in the application evaluation. Please call SHPO to confirm your application has arrived.

Application materials will not be returned. All application materials, including photographs, become the property of Montana Historical Society and may be reproduced by MHS or its partner organizations without permission, appropriate credit will be given for such use if documented is included in the application.

YOU MUST SUBMIT

- (1) original and four (4) copies – a total of 5 – complete application packages.
- Each copy must be securely assembled so as not to lose photographs, maps, brochures, or other supplemental materials.

A complete application package includes:

- Application on [2008](#) form.
- Authorizing Official signature; (Application Section 3 – page 1)
- Timeline for project completion. (Application Section 5.C.)
- Detailed budget. (Application Section 5.B.)

ELECTRONIC APPLICATIONS ARE AVAILABLE AT: <http://mhs.mt.gov/shpo/default.asp>

Applications must be received in the SHPO office by 5:00 pm, [Monday, March 3, 2008](#). This is NOT a postmark deadline.

SEND APPLICATIONS TO:

Preserve America Grants
Montana SHPO
PO Box 201202
1410 8th Avenue
Helena, MT 59620-1202

QUESTIONS?

FOR PROJECT QUESTIONS: Please contact Rolene Schliesman, DSHPO & CLG Coordinator, 406-444-7742, rschliesman@mt.gov.

FOR FINANCIAL/BUDGET/MATCH QUESTIONS: Please contact Roxann Lincoln, Grants Manager, 406-444-7768, rlincoln@mt.gov.
